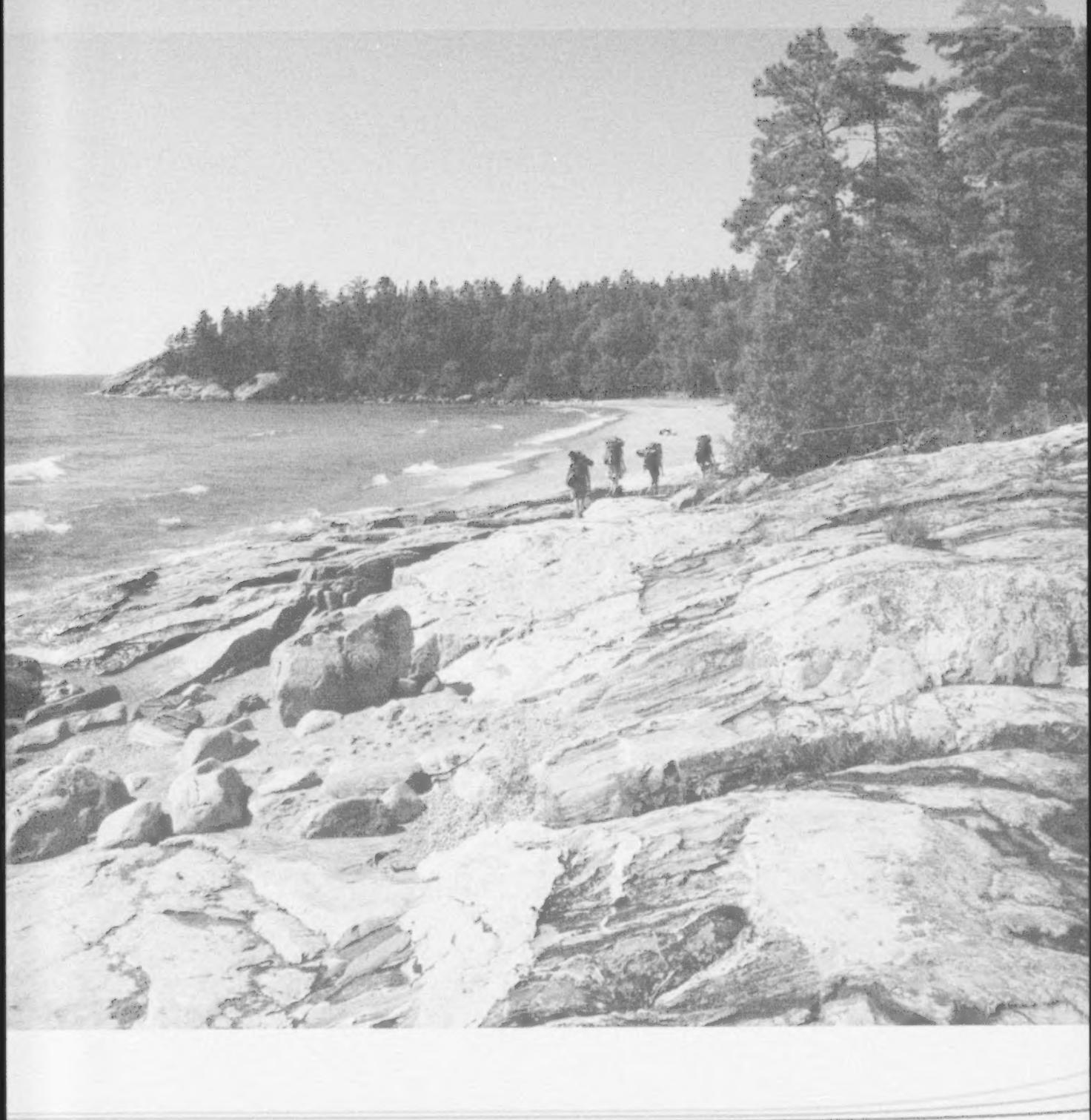


# ONTARIO'S PROTECTED AREAS PLANNING MANUAL

2014 EDITION



## ONTARIO PROTECTED AREAS PLANNING MANUAL 2014

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Printed in Ontario, Canada

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Photo taken by: Wayne Eardley

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## OVERVIEW AND PURPOSE OF THE PLANNING MANUAL

The Ministry of Natural Resources' (MNR) mandate includes the management and protection of Ontario's protected areas system. This system, comprised of more than 620 provincial parks and conservation reserves, contributes to the protection of the province's biodiversity. The system also helps to provide opportunities for sustainable outdoor recreation and land uses, natural heritage appreciation and research. Protected areas range in size, characteristics, diversity and accessibility and are of ecological, social, cultural and economic importance.

The purpose of the *Provincial Parks and Conservation Reserves Act, 2006* (PPCRA) is:

*"To permanently protect a system of provincial parks and conservation reserves that includes ecosystems that are representative of all of Ontario's natural regions, protects provincially significant elements of Ontario's natural and cultural heritage, maintains biodiversity and provides opportunities for compatible, ecologically sustainable recreation".*

**TIP:** In this manual, the term protected areas refers to provincial parks and conservation reserves.

Only when there is a specific difference (e.g., only provincial parks are subject to classification) are the two distinguished.

Section 10 of the PPCRA provides the legislative foundation for planning and management of Ontario's protected areas, including provisions around preparing, amending and examining management direction. The PPCRA also requires the preparation of a planning manual to guide all aspects of protected area management planning. The Ontario Protected Areas Planning Manual (Planning Manual) fulfills that requirement. The Planning Manual was first approved in 2009 (Appendix II). Since that time, a number of changes have taken place including amendments to the PPCRA and the development of supplementary materials intended to support protected area management planning. These changes have made it necessary to update the Planning Manual, resulting in this 2014 Edition.

The purpose of the Planning Manual is to provide policy direction to MNR staff and partners, define minimum requirements for preparing new management direction and for examining and adjusting existing management direction, and provide considerations around implementation. The Planning Manual is also a useful resource for Aboriginal communities and the public and stakeholders who have an interest in participating in protected area management planning.

The requirements and policies in the Planning Manual apply to protected areas proposed, recommended or regulated under the PPCRA and proposed or recommended additions or deletions to a regulated protected area. These areas can include Crown lands, parcels acquired by the province, or private property under long-term lease (e.g., lands owned by The Nature Conservancy of Canada).

The Planning Manual is supported by a series of supplementary guidelines, templates and tools. These materials provide technical and procedural direction on how to implement the policy in the Planning Manual and they identify opportunities to enhance or build upon minimum requirements. Supplementary materials are referenced throughout the Planning Manual and the guidelines are listed in Appendix I.

## APERÇU ET BUT DU GUIDE DE PLANIFICATION

Le ministère des Richesses naturelles (MRN) a pour mission, entre autres, de gérer et de protéger le réseau de zones protégées en Ontario. Constitué de plus de 620 parcs provinciaux et de réserves de conservation, le réseau contribue à protéger la biodiversité de la province en plus d'offrir des possibilités durables de loisirs en plein air et d'aménagement du territoire, d'appréciation du patrimoine naturel, et de recherche. Les zones protégées sont diverses sur le plan de leurs superficie, caractéristiques, diversité et accessibilité et elles sont d'importance écologique, sociale, culturelle et économique.

La *Loi de 2006 sur les parcs provinciaux et les réserves de conservation* (LPPRC) vise les objectifs suivants :

*« ...protéger de façon permanente un réseau de parcs provinciaux et de réserves de conservation qui comprend des écosystèmes représentatifs de toutes les régions naturelles de l'Ontario, qui protège les éléments du patrimoine naturel et culturel de l'Ontario dont l'importance est reconnue à l'échelle de la province, qui maintient la biodiversité et qui offre des possibilités d'activités récréatives compatibles et durables sur le plan écologique. »*

**ATTENTION :** Dans ce manuel, le terme zones protégées renvoie aux parcs provinciaux et aux réserves de conservation. Seulement quand il y a une différence spécifique (p.ex., seuls les parcs provinciaux sont assujettis à une classification), les deux sont différenciés.

L'article 10 de la LPPRC prévoit le fondement législatif de la planification et de la gestion des zones protégées de l'Ontario, y compris les dispositions autour de la préparation, la modification et l'examen de l'orientation de la gestion. La LPPRC exige aussi la préparation d'un guide de planification pour encadrer l'orientation de tous les aspects de la gestion des zones protégées. Le Guide de planification des zones protégées (Guide de planification) répond à cette exigence. Le Guide de planification a été approuvé en 2009 pour la première fois (Annexe II). Depuis lors, un certain nombre de

modifications sont survenues, dont les modifications apportées à la LPPRC et l'élaboration de documents supplémentaires visant à appuyer la planification de la gestion des zones protégées. En raison de ces modifications, le Guide de planification a été mis à jour en 2014.

Le Guide de planification a pour objectif de donner une orientation stratégique au personnel du MRN et à ses partenaires, de définir les exigences minimales pour la préparation d'une nouvelle orientation en matière de gestion et pour l'examen et la mise à jour de l'orientation existante en matière de gestion, et d'exposer des considérations entourant la mise en oeuvre. Le Guide de planification est aussi une ressource utile pour les collectivités autochtones, la population générale et les intervenants qui sont intéressés à participer à la planification de la gestion des zones protégées.

Les exigences et les politiques présentées dans le Guide de planification s'appliquent aux zones protégées qui sont proposées, recommandées ou réglementées en vertu de la LPPRC et aux ajouts ou suppressions proposés ou recommandés concernant une zone protégée réglementée. Ces zones peuvent inclure des terres de la Couronne, des parcelles acquises par la province, ou des propriétés privées assujetties à un bail à long terme (p. ex., terres détenues par Conservation de la nature Canada).

Le Guide de planification est appuyé par une série de lignes directrices, de modèles et d'outils supplémentaires. Ces documents donnent une orientation technique et procédurale sur la manière de mettre en oeuvre les politiques du Guide de planification et ils définissent les occasions d'améliorer ou d'étoffer les exigences minimales. Les documents supplémentaires sont cités tout au long du Guide de planification et les lignes directrices figurent à l'annexe I.

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## 1.0 PLANNING CONTEXT

The planning framework in which MNR makes management decisions has several levels, which result in progressively more detailed and specific decisions. Figure 1 illustrates where protected area management planning exists in the context of the provincial planning framework. The subject of this manual fits within Level 3: Management Direction.

Alignment of all levels of planning is encouraged, including establishing land use direction (Level 2), using this direction to inform the development of protected area management direction (Level 3), and using management direction to inform the implementation of projects (Level 4).

### Level 1 DIRECTION SETTING

**STRATEGIC ORIENTATION AND DIRECTIONS**  
**Identification of Protected Areas Goals & Objectives**  
 (e.g., PPCRA, MNR Strategic Directions – Our Sustainable Future, Ontario Provincial Parks Planning & Management Policies, permitted use)

### Level 2 LAND USE DIRECTION

**PROTECTED AREA SYSTEMS PLANNING & LAND USE PLANNING**  
**Identification & Recommendation of New Protected Areas**  
 (e.g., Ontario's Living Legacy Land Use Strategy, Crown Land Use Policy Atlas)

### Level 3 MANAGEMENT DIRECTION

**PROTECTED AREA MANAGEMENT PLANNING**  
**Preparation of management direction**  
 Management Statements  
 For Provincial Parks &  
 Conservation Reserves  
 Management Plans  
 For Provincial Parks &  
 Conservation Reserves  
*(This box is the primary focus of the Planning Manual)*

### Level 4 IMPLEMENTATION & OPERATIONS

**EVALUATION OF PROJECTS**  
**Class Environmental Assessment for Provincial Parks & Conservation Reserves**  
 a. Establish a new, modify or eliminate a provincial park or conservation reserve  
 b. Acquire or permanently dispose of land  
 c. Management projects (resource stewardship, development and operations, land and resource dispositions)

Figure 1: Protected area management planning in the context of MNR's planning framework.

Broad Provincial Level  
 ↑  
 ↓  
 Site Specific Level

## 1.1 Purpose of protected area management planning

The purpose of protected area management planning is to use clear, consistent and accountable processes (presented in this manual) to develop management direction. Protected area management planning is based on a values and pressures approach and guides the protection of values along with management of uses within a protected area to meet legislative and policy requirements. It is an ongoing progression of collecting and analyzing information, decision-making, monitoring and evaluation.

## 1.2 Purpose of management direction

The purpose of management direction is to guide protection, development and management of protected area values and resources over a 20-year time-horizon. Management direction describes the contribution(s) that a protected area makes to the achievement of the objectives and principles as set out in the PPCRA, and identifies site-specific management policies intended to maintain, or where possible, restore ecological integrity.

**TIP:** All planning documents must meet the current Ontario Public Service accessibility standards.

## 1.3 PPCRA principles

The PPCRA outlines objectives for establishing and managing protected areas, which centre on protection, ecologically sustainable recreation or land uses, education and research. Section 3 of the PPCRA establishes principles that guide all aspects of the planning and management of Ontario's system of protected areas.

- The maintenance of ecological integrity shall be the first priority and restoration of ecological integrity shall be considered.
- Opportunities for consultation (involvement) shall be provided.

Together, the PPCRA objectives and principles guide and influence protected area management planning.

### 1.3.1 Maintenance of ecological integrity

The PPCRA defines ecological integrity as follows:

*"Ecological integrity refers to a condition in which biotic and abiotic components of ecosystems and the composition and abundance of native species and biological communities are characteristic of their natural regions and rates of change and ecosystem processes are unimpeded."*

In other words, ecosystems have integrity when they have intact native biological components (plants, animals and other organisms), abiotic components (such as geology and water), and processes (such as reproduction and population growth). At the heart of the definition is in the naturalness of a protected area. However, the complex and dynamic nature of ecosystems means that putting this concept into practice is a challenge.

Ecological integrity is not a new concept, though it has gained much attention since the mid-1990s. For Ontario's protected areas the policy approach to addressing ecological integrity during management planning involves identifying and analyzing values and pressures to determine management priorities and actions. The processes presented in the Planning Manual and the supplementary guidelines promote sound planning in the context of maintaining and enhancing ecological integrity, while balancing other objectives related to recreation, education and research. Over time, with improving knowledge, experience and the involvement of Aboriginal communities, the public and stakeholders, MNR will build on existing and develop new tools and guidance to support the maintenance of ecological integrity.

### 1.3.2 Involvement requirements

The provision of opportunities for involvement in protected area management planning includes seeking input from Aboriginal communities, the public and stakeholders on topics of interest to them as well as the exchange of information, discussion of proposals and the potential development of partnerships. Section 10(6) of the PPCRA establishes the minimum involvement requirements:

- There shall be at least one opportunity for involvement during the development of a management statement (non-complex planning project) or for an amendment to management direction.

- There shall be more than one opportunity for involvement for management plans (moderately and very complex planning projects).

**TIP:** Enhancement of the minimum requirements for external involvement may be necessary to meet the needs of a particular planning project.

Throughout involvement, all discussions with and comments received from Aboriginal communities and the public and stakeholders must be recorded along with: how input was considered during decision making; if and how input was incorporated into management direction; and the rationale for whether input was incorporated or not.

Refer to the Guideline to Involvement during Protected Area Management Planning (Involvement Guideline) for direction on how and when to involve audiences and how to document and analyze input.

**TIP:** Planning teams should seek to understand potential audiences and their interests to help determine appropriate involvement approaches.

### 1.3.3 Early involvement

Early involvement can occur prior to initiating a planning project and undertaking formal involvement, and/or anytime during the scoping stage. It is intended to help gather information, determine interests, identify potential adverse impacts to Aboriginal and/or treaty rights, build a foundation of communication and help identify appropriate involvement approaches.

As part of early involvement, initiating contact with an Aboriginal community is required; however, the community and their interests will determine the extent or nature of early involvement.

Early involvement of public and stakeholders may be appropriate in the following circumstances:

- where there have been previous commitments,
- where there are specific interests in a protected area, and
- to seek specific expertise.

**TIP:** If it is discovered that Aboriginal or treaty rights may be affected, MNR has a legal duty to consult and, if appropriate, make accommodations so communities can continue to exercise their rights that have been affirmed in the Constitution Act.

### 1.3.4 Aboriginal community involvement

Aboriginal community involvement in protected area management planning is important, as many communities have an intrinsic connection to the land that includes social, cultural, spiritual, economic and ecological aspects. Some communities also have Aboriginal and/or treaty rights which they may exercise in protected areas. Aboriginal communities may also have information about the values and pressures in protected areas.

MNR can gain a better understanding of Aboriginal community interests and the protected area by working with individual communities to develop approaches to involve each community that are respectful of local knowledge, values and science and that recognize a community's available financial and human resources. Information and advice (e.g., Aboriginal traditional knowledge) contributed by Aboriginal communities can be used to inform management decisions throughout planning. Respectful involvement of Aboriginal communities will further develop relationships and will provide the foundation for stewardship efforts during implementation, monitoring, and operations.

**TIP:** Aboriginal communities may choose to not participate or respond to requests to become involved. It is important to continue to extend the offer to become involved throughout the planning process.

Minimum requirements for involving Aboriginal communities include:

- Initiating contact as part of early involvement.
- Providing early and ongoing opportunities for involvement.
- Providing opportunities to Aboriginal communities that are equal to or greater than those provided for the public and stakeholders. A customized approach, based on the request of a community, is useful to best meet the unique needs of each Aboriginal community.

- Providing communities a copy of any published documents.
- Proceeding with involvement activities that have been previously agreed upon.

Involvement with Aboriginal communities may also include opportunities to review and comment on draft planning documents, where appropriate.

### 1.3.5 Public and stakeholder involvement

Public and stakeholder involvement during protected area management planning is important in gathering information to support the development of management direction and to inform decisions on planning matters.

Minimum requirements for involving the public and stakeholders include:

- Placing on-site notices (for operating provincial parks only).
- Uploading published planning documents onto the MNR internet.
- Providing notification (e.g., mailed or e-mailed notices) of released documents to mandatory contacts.
- Posting a policy proposal notice (and subsequent decision notice) on the Environmental Registry.

Beyond the minimum requirements, enhancements to involvement should be based on the planning project and to best meet the needs of all interested and affected audiences (e.g., a meeting with a stakeholder group, an open house or in-person discussion for very complex planning projects). Refer to the Involvement Guideline for more information on enhancements to the minimum requirements for involvement.

**TIP:** Involvement approaches must allow open and transparent access to information, clear communication of proposed direction and rationale behind decisions.

### 1.3.6 Issue resolution

Concerns from various audiences can arise during protected area management planning. Resolving issues in a timely, transparent and appropriate manner is critical to the success of any planning project. Many issues can be resolved through informal discussions between the

planning team and the concerned person. In other cases, it may be necessary to initiate a formal issue resolution process (see Involvement Guideline).

## 1.4 MNR principles

In addition to the planning and management principles of the PPCRA, there are several other principles essential to protected area policy development and planning.

**TIP: MNR's Statement of Environmental Values**  
must be documented for new management direction and amendments to existing management direction.

### 1.4.1 Risk management

Ecosystems are complex and dynamic and vary in their resilience. Our ability to predict how ecosystems respond to management actions and human use is often limited. At times, priorities must be set and decisions made in the absence of scientific certainty or complete knowledge of the protected area. Risk management can help to improve decisions and set the best course of action in the face of uncertainty by identifying, assessing, understanding, acting on and communicating risks. Risk management should include consideration of potential cumulative effects. As part of risk management, staff should exercise caution and best judgment in the face of uncertainty. This includes using the best available information during decision-making and understanding the risk(s) to the value(s) or protected area. Protected areas are managed for ecological integrity and represent the best landscapes across the province; therefore, the risk tolerance for impacts to values is generally low.

### 1.4.2 Adaptive management

MNR's strategic direction, *Our Sustainable Future: A Renewed Call to Action* (OMNR 2011) establishes adaptive management as an operating principle:

*"Promote the use of adaptive management and an ecosystem approach to manage risk and to continuously improve our resource management decisions."*

Adaptive management involves monitoring and evaluating the implementation of an action and adjusting that action as necessary to reach a desired outcome.

During the implementation of certain actions, staff should work with ecologists and other specialists to design and apply appropriate adaptive management approaches. Adaptive management is particularly important when addressing negative impacts caused by climate change in protected areas. Given the uncertainty of future conditions in specific locations, including protected areas, it is important to be able to monitor, gather new information and adapt actions to reach a desired outcome.

#### 1.4.3 Landscape level planning

The scale at which resources are managed can vary in space, time and level of biological organization (e.g., genes, species, or ecosystems). Landscape level planning is based on managing resources at a broad biological scale (e.g., species distribution, ecological function), on a large geographic scale (i.e., across a broad landscape) and over long periods of time. This allows for:

- the identification of opportunities to align and coordinate management efforts,
- a greater understanding of cumulative effects,
- the identification of opportunities to restore ecological integrity,
- a stronger ability to balance resource demands,
- the opportunity to anticipate and prepare for future pressures,
- a greater ability to manage fiscal resources, and
- the ability to see patterns and trends that may not be obvious at a fine scale.

Ecological functions (e.g., natural disturbance patterns) should be used to help identify ecologically meaningful scales of management, where appropriate.

Although protected area management planning only applies to areas proposed, recommended or regulated under the PPCRA, it is important to consider the management of functional aspects of ecosystems across the landscape during the planning process. This includes recognizing the current and future role that a protected area plays in the broader natural landscape and what ecosystem functions it contributes to or depends on beyond its boundaries.

**TIP:** Landscape level planning requires an understanding of protected area values and pressures, along with ecosystem functions, and an understanding of these in the context of the broader landscape and protected area system.

#### 1.5 Management planning cycle

Protected area management planning occurs as a cycle. The management planning cycle delineates the stages in the development, implementation and maintenance of a management direction document (Figure 2). The stages direct various planning processes (i.e., developing, examining, adjusting management direction). Each process presents a methodical approach to planning and promotes consistency. Some planning processes result in the development of a document. For example, the Stage 1: Scoping directs the process for developing the terms of reference document. The planning processes are described in subsequent sections of this manual.

The management planning cycle is intended to meet the principles of the PPCRA while maximizing efficiency and effectiveness in protected area management planning. Since not all protected areas require the same level of planning, there is room for flexibility. It is possible to isolate or combine planning processes (within or between stages) to meet specific planning needs. The supplementary guidelines describe a number of opportunities to tailor the management planning process according to the circumstances that exist across Ontario. For example, different approaches to analyzing values and pressures may be used depending on the complexity of the planning project.

**TIP:** Adaptive management applies to any stage of the planning cycle.

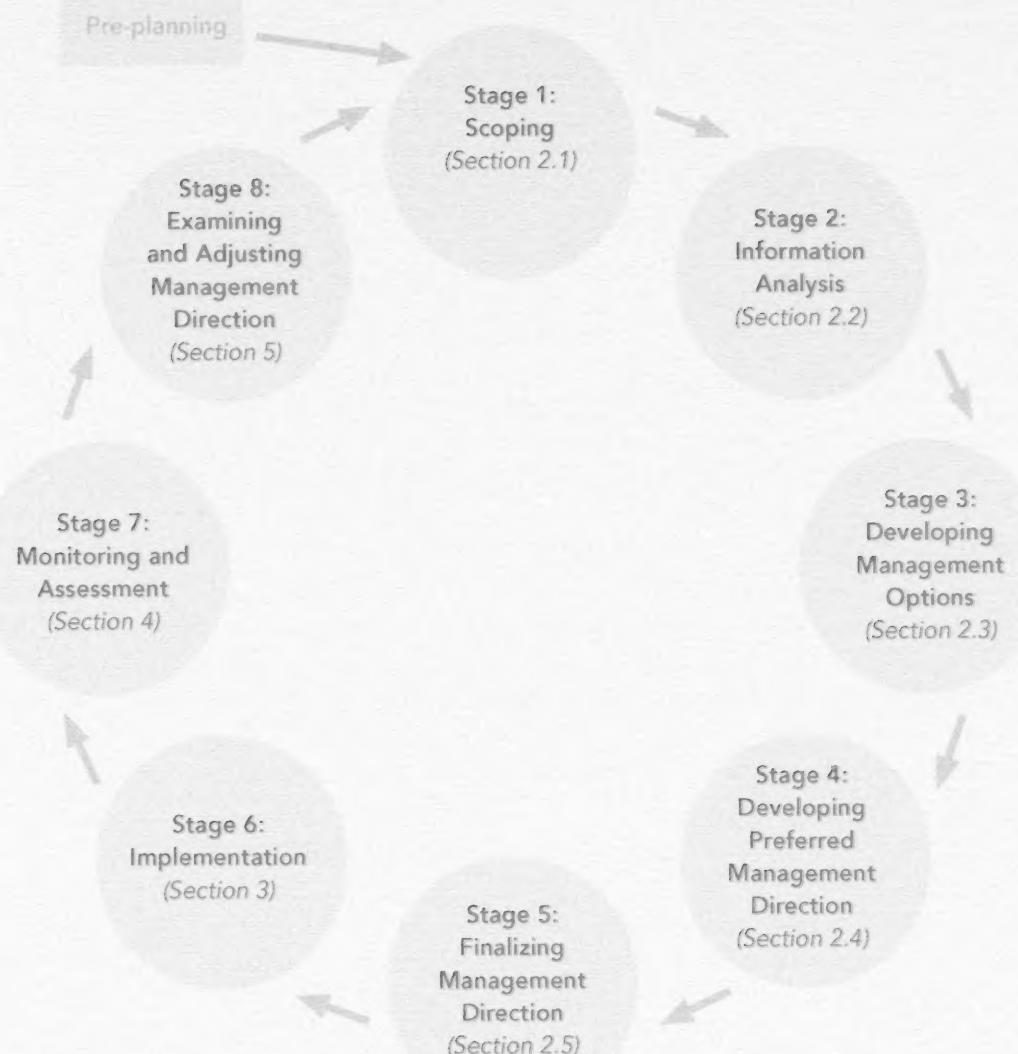


Figure 2: Protected area management planning cycle.

### 1.5.1 Pre-planning

Pre-planning is what happens before formal commencement of planning and is therefore not part of the management planning cycle. The intent of pre-planning is to prepare for a management planning process by anticipating what work will be involved and start to get ready for these things. Pre-planning includes identifying planning process requirements, identifying and filling any necessary information gaps, and early (and ongoing) involvement of Aboriginal communities and the public and stakeholders prior to initiating the formal protected area management planning process. Pre-planning can also help to determine time and resource requirements for the planning project and prepare accordingly for these.

### 1.5.2 Planning team

Planning teams are responsible for completing the planning work associated with the various stages and processes in the management planning cycle. A team must be established for management planning and examination processes. Establishing a team is discretionary for adjustments.

An integrated approach is used to identify planning team members. Teams are generally comprised of MNR staff that bring a variety of skills and expertise to the project. Planning teams may also occasionally include external experts and/or partners (e.g., Aboriginal community).

### 1.5.3 Grouping

The PPCRA allows for the development of management direction for one or more protected area(s). This concept, termed grouping, may take two different approaches:

1. Single management direction document: development of one management direction document, as part of one planning project that applies to more than one protected area (Figure 3).
2. Multiple management direction documents: development of separate management direction documents, as part of one or multiple planning projects that applies to each protected area (Figure 4).

— — — Management planning process — — — →



Figure 3: Grouping to develop one management direction document.

— — — Management planning process — — — →

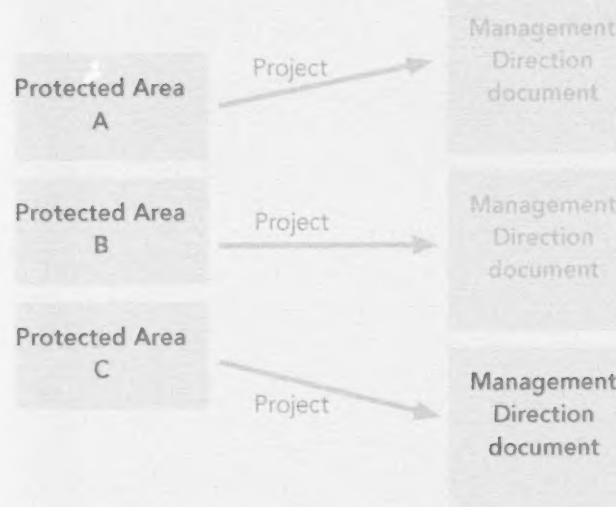


Figure 4: Grouping to develop multiple management direction documents.

Grouping can include coordination of involvement opportunities (e.g., one open house) and planning documentation (e.g., one terms of reference). Grouping to develop a single management direction document may be appropriate where protected areas in the same geographic extent have similar features, users, activities, management intent and prescriptions. Grouping to develop several management direction documents may be appropriate where protected areas in the same geographic area have similar features, users, activities and management intent but have potential for different issues to arise that may require separate consideration.

Grouping can help build efficiencies in the management planning process by:

- streamlining involvement and increasing transparency and clarity for Aboriginal communities and the public and stakeholders,
- lowering project costs,
- reducing redundancy of work efforts, and
- helping to facilitate landscape level planning.

### 1.5.4 Alignment

Alignment means meeting the requirements of the protected area management planning process and other applicable planning processes through different mechanisms, at the same time. Protected area management planning can potentially be aligned with other planning process requirements, such as:

- Class Environmental Assessment for Provincial Parks and Conservation Reserves (Class EA-PPCR) projects or other environmental assessment mechanisms,
- amendments to area-specific Crown land use policy,
- boundary regulation amendment(s), or
- other planning processes (e.g., Niagara Escarpment Plan).

For example, involvement (e.g., open house) for a management direction amendment that enables a Class EA-PPCR project may be undertaken at the same time as involvement for the Class EA-PPCR project. In this case, involvement opportunities occur at the same time, but each process is undertaken separately and documentation is completed as required by each process.

Some benefits of alignment include:

- streamlining involvement and increasing transparency and clarity for Aboriginal communities and the public and stakeholders,

- improving timelines, and
- lowering project costs.

The planning team will have to weigh the potential advantages of aligning processes against potential disadvantages (e.g., increased project complexity, difficulty in maintaining process alignment). Processes that will be clear and easy for the public to understand should be used.

### 1.6 Protected area information

The ecological, social, cultural and economic environments in which protected areas exist influence management planning. Therefore, a wide array of supporting information is needed, including ecological, geological, social and economic data, Aboriginal traditional knowledge and local knowledge shared by stakeholders and the public. Information comes in various formats, sources, precisions, sensitivities and scales. Planning for protected areas should be based on defensible, reliable and verifiable evidence or information. Wherever possible, information needs and priorities should be included in long-term work planning schedules and be addressed prior to commencing a planning project; however, information may need to be collected throughout a planning project in order to inform decisions.

The *Freedom of Information and Protection of Privacy Act* (FIPPA) governs:

- access to a variety of information, including information collected for protected area management planning, and
- the protection of privacy of individuals associated with information required for protected area management planning.

MNR shall determine whether information obtained in accordance with the PPCRA can be made available to the public. In making these determinations, MNR shall comply with FIPPA. MNR will restrict access to certain sensitive information that, if made available, could cause harm or threaten the existence, integrity or health of a natural or cultural resource feature or value (archaeological sites, species at risk locations, etc.).

#### 1.6.1 Information management

Information management involves storing, archiving, sharing and updating information related to a protected area in order to support protected area management planning. It is important to begin managing protected area information once a planning project commences and throughout the entire planning process. Documenting information helps to provide transparency and accountability around decision-making and archives information for future reference.

## 2.0 STAGES 1-5: MANAGEMENT PLANNING PROCESS

This section outlines the stages in the management planning process. The management planning process is made up of stages 1 to 5 in the management planning cycle and directs the development of new management direction.

While the stages are presented sequentially, work on multiple steps within each stage often occurs at the same time and there may be a need to return to previous steps when new information becomes available. Some requirements are not easily portrayed in a step by step process. For example, ongoing involvement of Aboriginal communities and the public and stakeholders may occur throughout the management planning process (in addition to the minimum involvement requirements that occur at specific stages).

Figure 5 illustrates that the opportunities for involvement in a management planning process will vary depending on the complexity of a specific planning project. Generally, as planning complexity increases, the work needed to complete each stage also increases. The Guideline to Management Planning for Protected Areas in the Context of Ecological Integrity (Planning Guideline) provides procedural direction on completing the management planning process.

### 2.1 Stage 1: Scoping: Defining the planning project

Scoping the planning project helps define what the project will and will not deliver (i.e., what is in or out of scope) and influences the project's overall success.

This stage involves:

- initiating and defining the planning project,
- developing an approach to involvement, including early involvement of Aboriginal communities and the public and stakeholders (section 1.3.2 and 1.3.3), and
- preparing and approving the terms of reference.

#### 2.1.1 Initiating and defining the planning project

Initiating and defining the planning project involves:

- identifying planning team members and a basic review of information,



- determining the planning area, planning complexity and planning topics, and
- developing a basis for the purpose and vision statements.

#### Planning area

The planning area is the extent of the regulated boundary/boundaries of the protected area(s) including recommended additions and/or deletions to be included in the planning project.

#### Planning complexity

Individual planning projects vary in their level of complexity (non-complex, moderately complex, very complex) depending on the amount and type of issues, proposals, resource management and potential impacts on values from new capital infrastructure. Generally, the fewer resource management, proposals, issues and/or impacts to values, due to new infrastructure that is expected, the lower the complexity of a planning project. As more resource management, proposals, issues and/or impacts to values, due to new infrastructure are expected, the complexity of a planning project increases. The level of planning complexity influences the number of involvement opportunities provided throughout the management planning process (Figure 5).

**TIP:** Management statements are normally developed for non-complex planning projects; management plans are normally developed for moderately and very complex planning projects.

As a result of Aboriginal community and public and stakeholder involvement, it may become evident that projects are more or less complex than originally thought, and it may be appropriate to change the level of planning complexity. For non-complex or moderately complex planning projects, an increase in planning complexity is known as a process upgrade, to allow for further opportunities for involvement (Figure 5). For moderately or very complex planning projects, a decrease in planning complexity is known as a process downgrade. If the level of planning complexity changes during the process then the process requirements of the new complexity level must be met (e.g., number of involvement opportunities, planning documentation).

#### **Purpose and vision statements**

The purpose statement describes why the protected area was established and how it contributes to the overall protected areas system. The vision statement is an extension of the purpose statement and provides perspective on the protected area and its desired state in 20 years. The basis of the purpose and vision for the protected area are identified early in the management planning process to help focus analysis and discussion on the most important values, pressures and activities later in the process; however, the statements are not fully developed until stage 4 (section 2.4.1).

#### **Planning topics**

Those topics considered by the planning team to be relevant to the protected area must be identified as early as possible to help focus subsequent discussions in the management planning process. It may also be appropriate to identify specific topics or proposals that will not be addressed during the process or will be dealt with at a later time or through another mechanism (e.g., a secondary plan).

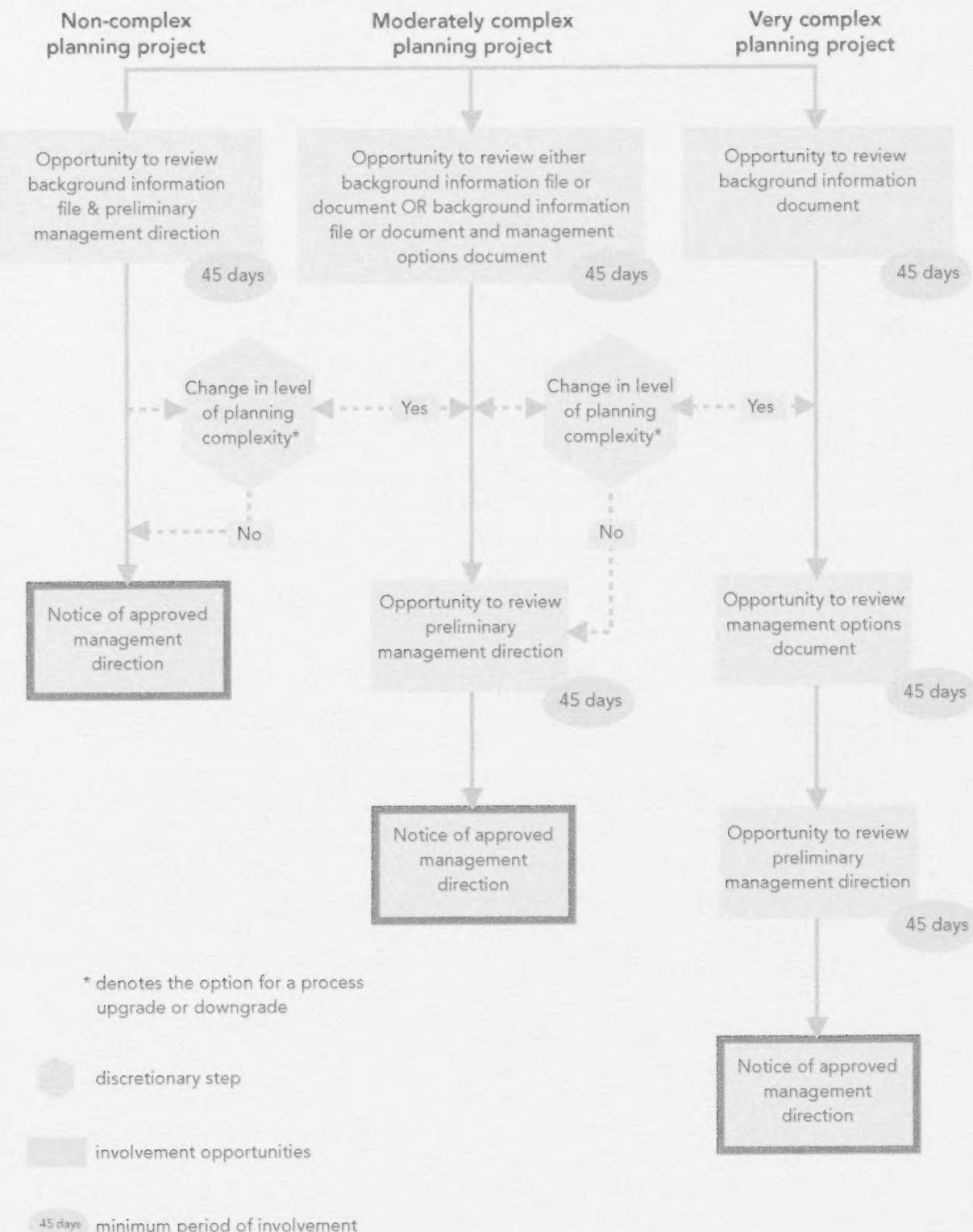


Figure 5: Management planning process involvement opportunities according to level of planning complexity.

### 2.1.2 Terms of reference

A terms of reference must be prepared to support the development of all new management directions. The terms of reference serves as a record of the outcome of the scoping stage and is intended to guide the planning team to deliver on a planning project. There is no requirement to publish or externally consult on the terms of reference.

The terms of reference contains the following content:

- Planning team membership
- Planning context including:
  - ▲ rationale for planning
  - ▲ planning area
  - ▲ level of planning complexity
  - ▲ purpose of the protected area (components)
  - ▲ main planning topics
  - ▲ where alignment with other planning processes is possible
  - ▲ involvement approaches

The terms of reference may also include a project schedule detailing specific tasks and timelines for staff, and a budget outlining costs and resourcing for the project. If not included in the terms of reference, this information could be outlined in a project charter or project plan.

## 2.2 Stage 2: Information analysis

The analysis of information helps to determine the priorities for a protected area and forms the basis for the development of management direction content. This stage involves:

- assembling information sources to identify values and pressures,
- analyzing values and pressures to identify priorities and management actions,
- developing a background information file or document, and
- using information to inform monitoring and zoning (where applicable).

**TIP:** Missing information should be noted and identified for later planning stages. Efforts should be made to acquire information where it is needed to support decisions.

### 2.2.1 Information review to identify values and pressures

The review of relevant information helps identify values and pressures. Values and pressures information provides the basis for the analysis to determine management priorities and actions. Background information is also useful when evaluating the implementation and overall effectiveness of management direction (section 4.0), and when considering adjustments to or the examination of management direction (section 5.0).

Information can be of different geographic scales, of varying age and from different sources. Typical information sources include:

- basic information sources (i.e., existing management direction, legislation, regulations and policy),
- local information sources (e.g., monitoring results, ecodistrict studies and inventories) and
- information from best informed people (e.g., Aboriginal communities, naturalist groups, hunters, anglers).

As planning complexity increases, the depth and rigour of information used to support and inform planning decisions should also increase. For example, if substantial resource management activities (e.g., large-scale habitat restoration) are contemplated, it is expected that the information used to support the resource management decision will be detailed and comprehensive.

The following types of information should be collected and reviewed:

- natural heritage values
- cultural heritage values
- outdoor recreation values
- traditional outdoor heritage values
- social and economic benefits
- protected area pressures

The planning team must identify the values and pressures for the protected area including those considered to be values of conservation interest (VCI).

### 2.2.2 Values, pressures and management actions analysis

Values and pressures analysis involves determining which values are under pressure, and of these, which are under the greatest threat (or risk). Those values at greatest

risk become priorities requiring management action. Non-complex planning projects generally have a limited number of priorities for management action. Moderately and very complex planning projects generally have a greater number of priorities for management action. Typically, as the complexity of the project increases, the tools and requirements for completing and documenting the analysis of values and pressures become more rigorous. This flexibility allows for appropriate allocation of resources and application of effort in accordance with the complexity of and circumstances surrounding individual planning projects.

Once management priorities have been identified through a values and pressures analysis, actions to address those priorities must be developed. Management actions are developed by identifying the underlying cause associated with a pressure on a value and looking at what actions can reduce, mitigate or remove the negative impact thereby restoring natural ecological processes. Management actions may address impacts of pressures on values; other actions may be associated with the development and maintenance of a protected area. A list of possible actions for each management priority is developed and then evaluated to determine which actions are achievable and feasible and require enabling in the management direction. Actions, in part, inform the development of the protected area policies to be included in the preliminary management direction document. Determining the need for monitoring the effectiveness of actions (section 4.2) is also completed as a continuation of the analysis.

The Planning Guideline provides additional details on the various approaches to analyzing values and pressures, when to apply them and documentation requirements.

### 2.2.3 Background information file or document

A background information file or document consolidates information gathered as well as the results of the analysis thus far in the management planning process. This document provides an opportunity for the planning team to present to the public, the information being used to inform planning decisions, as well as the management priorities as identified by MNR.

A background information file supports non-complex planning projects and is normally sufficient to support moderately complex planning projects. A background information document is required for a very complex

planning project and should be considered for a moderately complex planning project, especially if developing management options.

A background information file or document includes the following content:

- planning history
- planning area including regional setting, land tenure and existing development in the protected area
- purpose of the protected area (components)
- values information (natural and cultural heritage, recreational and land use)
- resource use information
- social and economic benefits
- pressures information
- management considerations and priorities
- list of references

**TIP:** Input after the release of background information may lead to more information on protected area use. As a result, options may begin to emerge as the planning team gains a greater appreciation of the protected area use and others' perspectives.

### 2.2.4 Zoning

Zoning is a tool used to describe specific geographies within a protected area, where certain policies apply. Zoning is particularly useful where there are a number of discrete values to protect and/or there is extensive public use in a portion of the protected area. Values and uses in a specific portion of the protected area with common management needs and intent are typically addressed under one zone.

The PPCRA indicates that provincial parks may be classified according to a classification framework. Furthermore, the PPCRA allows for the creation of zones within protected areas as part of developing management direction. Where a provincial park has been classified based on the framework, zoning is essential to allow for orderly and effective management of the park. The Ontario Provincial Parks Planning and Management Policies (OMNR 1992) presents zoning details specific to each class of provincial park. Zoning conservation reserves may be useful where there is a need to clearly distinguish different management approaches in portions of the conservation reserve.

## 2.3 Stage 3: Developing management options

Developing management options provides an opportunity to propose and gain input on, through external involvement, alternative approaches to managing a protected area. Management options are identified during the information analysis stage and further developed at this time.

### 2.3.1 Management options and planning complexity

Management options are presented for very complex planning projects and may be presented for moderately complex planning projects. Non-complex planning projects do not present management options. If management options arise for a non-complex planning project, a process upgrade is required.

For moderately complex planning projects, there may be only a few management options. In such cases, there is a choice to release the background information along with the management options document during the first opportunity for involvement. Where moderately complex planning projects have many management options, a separate involvement opportunity may be warranted. In this case, a process upgrade to very complex is required. Options are then presented in a management options document in an involvement opportunity separate from the background information document and prior to the development of the preliminary management direction.

### 2.3.2 Management options document

The management options document presents options by framing their context and providing considerations for each alternative. The intent of developing management options during this stage is to provide enough information so that Aboriginal communities and the public and stakeholders can understand each option and its implications, and provide comments on their preferred approach.

A management options document includes the following content:

- Introduction:
  - ▲ description of planning area
  - ▲ purpose of the developing management options stage
  - ▲ scope of the management options

▲ what people are being asked to comment on and how comments will be considered to help determine preferred direction

#### ■ Management options (for each option presented):

- ▲ planning topic
- ▲ values (if applicable)
- ▲ pressures/overarching issue
- ▲ options to address the pressures/issue
- ▲ consideration of each option including anticipated result/impact (value and pressure), implications on resources and to protected area users and ability to enforce

#### ■ Involvement opportunities

#### ■ List of references

External input received during involvement on the management options document informs the development of the preferred management direction during the next stage.

## 2.4 Stage 4: Developing preferred management direction

This section describes the content and documentation requirements for preliminary management direction. This is the stage in planning when MNR's preferred direction is presented, along with priorities for protecting and managing protected area values and addressing pressures over the next 20 years.

### 2.4.1 Purpose, vision and site objectives

Fully developed purpose and vision statements are presented as part of the preferred direction in the preliminary management direction document. These statements should be based on what was identified during the scoping stage, and reflect the results of any previous analysis and external input received up until this point.

Objectives should be measurable and achievable. They should focus on the values, pressures and management actions specific to the protected area while reflecting the overarching objectives established in the PPCRA. Each protected area may have several objectives that address a range of protection, recreation, traditional outdoor heritage, natural and cultural appreciation and scientific research topics. Every protected area must have a protection objective.

#### 2.4.2 Protected area policies

Policies are intended to guide what activities and uses are permitted or not permitted in a protected area. These policies are, in part, informed by the management actions identified during the values and pressures analysis (section 2.2.2). Policies are written to support the implementation of actions, opportunities (e.g., partnerships) and priorities including those activities subject to the Class EA-PPCR. All protected area policies must be consistent with overarching provincial policy.

#### 2.4.3 Preliminary management direction document

Preliminary management direction can be in the form of a management statement for non-complex planning projects, or a management plan for moderately or very complex planning projects.

The preliminary management direction includes the following content:

- Introduction (general description, etc.)
- Planning context (planning initiatives, legislation, etc.)
- Aboriginal community information (if applicable)
- Location and boundary
- Designation/classification (as appropriate)
- Purpose, vision and site objectives
- Values and pressures
- Zoning (as appropriate)
- Policies and actions (associated with management, operations and development)
- Implementation priorities
- Examination and adjustment information
- Summary of Aboriginal community and public and/or stakeholder involvement

For non-complex planning projects, the preliminary management direction is presented along with the background information file during the first and only opportunity for involvement (Figure 5). For moderately complex planning projects, the preliminary management direction is presented during the second and final involvement opportunity. For very complex planning projects, the preliminary management direction is presented in the third and final involvement opportunity. Preliminary management direction takes into consideration any comments received through previous Aboriginal community and public and stakeholder involvement (e.g., involvement on the background information file/document and management options document).

#### 2.5 Stage 5: Finalizing management direction

The content and structure of the final management direction document are the same as the preliminary management direction, covered in the preceding section. Following Aboriginal community and public and stakeholder involvement on the preliminary management direction, the document undergoes revisions, in consideration of input received, to create the final management direction document that will go forward for approval. Once approved, management direction is kept on file and posted on the MNR internet site.

### 3.0 STAGE 6: IMPLEMENTATION

Once the management direction is approved, the important task of implementing that direction begins. This involves releasing the approved management direction and implementing identified actions based on priority.

#### 3.1 Releasing management direction

Releasing the approved management direction includes communication, information management and preparing to implement actions identified in the management direction. Consider the following:

- Inform managers, partners and the public of any relevant provisions or implications of the approved management direction, its interpretation and implementation.
- Update local, zone, regional and provincial databases and information management systems to reflect information from the approved management direction.

#### 3.2 Implementing management actions

Prior to implementing new actions or activities, confirm that they are consistent with management direction and that appropriate approvals are in place, or are otherwise permitted (e.g., through provincial policy). Actions are implemented according to their priority and available staff and financial resources.

Application of the Class EA-PPCR is a legal requirement under the *Environmental Assessment Act*. Confirm that actions or activities subject to the Class EA-PPCR are enabled in the management direction where necessary and that requirements have been completed. The Class EA-PPCR requires staff to consider protected area values, including minimizing potential net negative effects on ecological, social, cultural and economic features and deciding whether and how to implement most actions in protected areas. Refer to the Class EA-PPCR and its supplementary materials for more information on the environmental assessment process and requirements.



## 4.0 STAGE 7: MONITORING AND ASSESSMENT

Monitoring and assessment involves identifying whether actions in the management direction were implemented, and if so, whether they were effective. This helps to evaluate the overall application and efficacy of management direction, including the achievement of the protected area vision, objectives, and actions, and whether ecological integrity is being maintained or restored. Monitoring can also help to identify the need to apply adaptive management by providing information on how actions can be improved or changed to reach a desired outcome. The primary focus of monitoring should be on protected area values, the protected area as a whole and where there are legal obligations (e.g., species at risk). Information collected during monitoring and assessment is used to inform the examination of management direction.

There are three types of monitoring used throughout the management planning cycle:

- 1) Condition monitoring (section 4.1)
- 2) Effectiveness monitoring (section 4.2)
- 3) Implementation monitoring (section 4.3)

**TIP:** Monitoring carried out in association with the Class EA-PPCR may be used as part of monitoring the effectiveness of the management direction.

### 4.1 Condition monitoring

Condition or surveillance monitoring is used to establish the baseline condition of a value or status of a pressure within a protected area, and to measure changes in that condition or status over time. Condition monitoring can serve as an early warning of undesirable changes in the condition of a value. This perspective answers the question “What condition is the value in?” and provides an indication of potential threats to the value and ultimately to the ecological integrity of the protected area(s). Condition monitoring assists with determining where actions to address pressures on values may need to be taken. This type of monitoring is typically identified as a specific action during the development of management actions (section 2.2.2).



### 4.2 Effectiveness monitoring

Effectiveness monitoring is used to determine whether the implementation of the actions identified in the management direction have been effective in achieving what they were intended to, answering the question “Did the action have the desired effect?” This typically involves monitoring the condition of a protected area value or status of a pressure in association with implementation of an action to determine if activities intended to mitigate undesirable impacts on values have been successful. The need for effectiveness monitoring is identified as a continuation of the values and pressures analysis (section 2.2.2). Effectiveness monitoring is undertaken as management priorities are implemented and can help to inform adaptive management, if needed.

#### 4.3 Implementation monitoring

Implementation monitoring determines if the actions identified in the management direction were carried out, answering the question, "Did we do what we said we would do?" This type of monitoring is essentially an audit of performance in following through on management direction and could be applied to all actions and policies associated with the management direction. Implementation monitoring is an important aspect of examining management direction because it shows the degree of management direction implementation. Implementation monitoring should occur according to the implementation priorities outlined in the management direction document.

## 5.0 STAGE 8: EXAMINING AND ADJUSTING MANAGEMENT DIRECTION

Management direction is prepared with a 20-year time horizon in mind. The implementation of management direction should be monitored on an ongoing basis, examined according to a cycle and adjusted as necessary in an effort to keep it relevant, effective and current. In addition, proposals or emerging issues may be identified by Aboriginal communities or the public or stakeholders, and if pursued, may result in the need to undertake an unscheduled examination.

### 5.1 Examinations

In keeping with the PPCRA, MNR shall examine, in an order determined by MNR, management direction documents that have been in place for 20 years or more and shall determine the need for adjustment to, or replacement of, the direction. An examination looks at whether the management direction is:

- Relevant: consistent with the overall intent of the protected area, legislation, regulations and all related policies.
- Effective: successful in protecting values and guiding protected area management until the next scheduled examination.
- Current: reflects the current status of the protected area.

If the management direction is not relevant, effective or current, changes are necessary to guide the management of the protected area until the next scheduled examination.

#### 5.1.1 Examination cycle

Management direction is initially examined 20 years after the document is approved. Examinations are completed every 10 years thereafter, as long as the outcome is not a replacement. If management direction is replaced, the examination cycle starts over (initial examination after 20 years).

An examination may occur at any time outside of the normal examination cycle, at the discretion of MNR. For example, an examination may be triggered when a substantial new development or other resource management activity is proposed that is not addressed in the current management direction.



#### 5.1.2 Examination outcomes

There are four possible outcomes resulting from an examination:

1. **Status quo:** The existing management direction is still relevant, effective and current and no changes are required to continue management of a protected area.
2. **Administrative update:** A type of adjustment that involves changes that clarify, correct and update management direction to make it relevant, effective and current. Administrative updates do not involve changes to policy intent or to the management of the protected area, and do not require the provision of external involvement.
3. **Amendment:** A type of adjustment that involves a change in policy or alters the intent of the management of the protected area to make the management direction relevant, effective and current. Amendments require the provision of external involvement.
4. **Replacement:** Management direction is no longer relevant, effective or current and requires substantial changes to proceed with management of the protected area. This requires the preparation of a new management direction using the management planning process and provision of external involvement.

Refer to the Examining Protected Area Management Direction Guideline (Examination Guideline) for the examination process and the questions to consider in determining the outcome of an examination of management direction.

#### 5.1.3 Information to support examinations

Minimum information sources required to support an examination include:

- current management direction (including all past adjustments),
- current legislation, regulation, policy and
- existing background information (inventory and monitoring results, etc.)

Additional information sources (e.g., best informed people) can be assembled to support the examination depending on the need.

#### 5.1.4 Examination records and reporting

Copies of all examinations are recorded on file. MNR will make the outcome of completed examinations publicly available.

**TIP:** Adjustments to management direction may result in amendments to area-specific Crown land use policy.

#### 5.2 Adjustments

Adjustments involve change(s) to existing management direction to keep it relevant, effective and current. Adjustments can be in the form of either an administrative update or an amendment, and can vary in the level of complexity.

Refer to the Adjusting Protected Areas Management Direction Guideline (Adjustment Guideline) for procedural direction on completing administrative updates and amendments.

##### 5.2.1 Adjustment complexity

The level of complexity of an adjustment will vary depending on the planning project (Figure 6). The level of complexity depends on the amount and type of resource management, issues and/or proposals, infrastructure needs and potential impacts to values and Aboriginal community and public and stakeholder interests. The level of complexity of an adjustment may influence several factors, including:

- level of resources required (e.g., staff time),
- amount of information needed to support the adjustment, and
- number of external involvement opportunities provided.

As adjustments become more complex, the level of resources, number of involvement opportunities and the depth and rigour of information needed to support the adjustment typically increases. Administrative updates are the least complex type of adjustment. Amendments may range from non-complex to moderately complex to very complex depending on the changes proposed.

#### Types and range of adjustments

Status Quo	Administrative Update	Non-complex Amendment	Moderately Complex Amendment	Very Complex Amendment	Replacement
Least complex					Most complex

Figure 6: Possible examination outcomes, including the range in complexity of adjustments.

### 5.2.2 Administrative updates

Administrative updates are an internal MNR process intended to correct or clarify management direction. They do not involve any change in policy. Administrative updates do not require Aboriginal community or public or stakeholder involvement; however, it may be prudent for MNR staff to advise potentially interested audiences, by appropriate means, when contemplating administrative updates.

A terms of reference is not required when processing administrative updates. The updated and approved management direction document is kept on file and placed on the MNR website.

### 5.2.3 Amendments

Amendments involve a change in policy. The process of amending management direction will include at least one opportunity for involvement. Depending on the complexity of the amendment, additional opportunities for involvement may be warranted. The principles of early involvement and tailoring involvement approaches to best suit the needs of Aboriginal communities should be applied. Approved amendments to management direction are stored on file and posted on the MNR website.

MNR should not amend an existing management statement, particularly older (grandparented) statements of conservation interest or interim management statements for which prior consultation did not occur, to allow substantial or address complex issues or proposals. In this situation, MNR should instead prepare a new management plan to address the substantial or complex proposal(s).

### Secondary plans

For protected areas, secondary plans are occasionally prepared for a complex topic(s), where the approved management direction does not provide sufficient policy direction to address a certain topic(s). Examples of complex or technical topics may include wildlife, fisheries, fire and/or ecosystem management. All the requirements for an amendment to an existing management direction are applied to the preparation of a secondary plan, including associated Aboriginal community and public and stakeholder involvement opportunities. A secondary plan can be used to address similar topics for more than one protected area where there are comparable management intent and policies.

Where possible, all current and potential future management activities should be addressed in the management direction document. However, in some limited cases, an approved management direction may defer direction and prescribe the preparation of a secondary plan. Alternatively, the need for a secondary plan might arise in response to an unforeseen circumstance, or if an examination of management direction results in an amendment outcome that is most appropriately addressed in a secondary plan. In some cases, preparation of a secondary plan can be coordinated with a Class EA-PPCR project evaluation.

### 5.2.4 External proposals for an amendment

Any person can propose an amendment by making a submission to MNR, identifying details of the proposed amendment and explaining the benefits. If MNR deems the proposal appropriate based on the following, the amendment process is triggered.

Proposals for amendments must be evaluated to determine:

- Consistency with legislation, regulations and policy.
- Whether there is an urgent need or the proposal can be postponed (e.g., until the next scheduled examination).
- Anticipated degree of Aboriginal community or public or stakeholder interest or support.
- The extent to which similar issues may have been considered and deferred, such as in the initial development of the management direction, through a recent request, or elsewhere in the protected area system.
- MNR's capacity to address the proposal (e.g., finances, staffing and information).

MNR will forward the proponent a written notice of decision (including rationale) regarding whether the proposal was accepted, declined or deferred.

## 6.0 PLANNING MANUAL ADMINISTRATION

### 6.1 Revisions to the Planning Manual

MNR may revise this Planning Manual from time to time, to improve and update information based on experiences in using the Planning Manual, and/or as new information becomes available to improve its effectiveness and ease of use.

MNR will retain an electronic copy of the original Planning Manual as well as any revisions made. The most up to date version of the Planning Manual will be available on the MNR website.

#### 6.1.1 Minor Revisions

In general, a minor revision to the Planning Manual may involve:

- Making administrative and editorial changes.
- Applying modifications required to keep the Planning Manual relevant, effective and current, while not changing the existing policy direction and requirements.
- Correcting or clarifying the intent of a statement or requirement.
- Addressing minor errors or omissions.
- Adhering to an amendment to the PPCRA or other pertinent legislation.
- Complying with changes in MNR's strategic direction.

MNR may approve minor Planning Manual revisions without external involvement.

#### 6.1.2 Major Revisions

Major revisions would include changes that MNR considers may have significant impact on the implementation of the Planning Manual. They could include changes to the following:

- Mandatory public notice procedures or timelines.
- Essential elements of protected area management planning processes.

There will be an external involvement opportunity provided in association with proposed major revisions to the Planning Manual. MNR will undertake involvement in accordance with an involvement approach specifically developed for the revision. This will include, at a minimum:

- mailed notice to Aboriginal communities,
- mailed notice to select stakeholders (i.e., provincial/national/local level non-government organizations and agencies),
- environmental Registry policy proposal notice, and
- notice placed on the MNR website.

MNR will consider any comments received prior to approving a major revision to the Planning Manual. Once revisions are approved, MNR will post a policy decision notice on the Environmental Registry.

### 6.2 Transition Provisions

The 2009 Planning Manual replaced the Ontario Provincial Park Management Planning Manual (1994) and other prior processes used for conservation reserve management planning. This Planning Manual (2014 Edition) replaces the 2009 version. However, when the Planning Manual (2014 Edition) comes into effect, planning and implementation of management direction documents will be underway at various stages using the older planning manuals.

The following provisions will ensure a smooth transition between previous requirements and the new Planning Manual requirements:

- Where a planning project is underway, that process may continue if the planning team has already commenced formal external involvement on the date when this manual approval takes effect. The planning team should apply the requirements of this manual to the rest of the planning process wherever practical.
- Once approved, this manual applies to any new planning projects (including those projects which have commenced but where external involvement has not yet taken place).
- The maintenance and restoration of ecological integrity must be appropriately considered for all planning projects, regardless of where the project is in the process.

Contact appropriate staff in the Parks and Protected Areas Policy Section (PPAPS) for questions around the transition of planning projects.

## 7.0 DEFINITIONS

**Action:** Any management activity identified in the management direction. This includes activities (other actions) related to operations and development, resource use, stewardship and monitoring (e.g., the management direction identifies the need to develop a new campground, create a new access point, or conduct shoreline stabilization). An action can be developed internally within MNR or can be proposed by an external party.

**Abiotic:** Describes the non-living components of an ecosystem.

**Aboriginal peoples or Aboriginal communities:** A collective name for the original people of North America and their descendants. The Canadian Constitution (the *Constitution Act, 1982*) recognizes three groups of Aboriginal peoples – Indians, Metis and Inuit. These are three separate peoples with unique heritages, landscapes, cultural practices and spiritual beliefs.

**Adaptive management:** A process for continually improving management policies and practices by learning from the outcomes of their application.

**Administrative update:** A type of adjustment to management direction. An administrative update involves changes that clarify, correct and update management direction to make it relevant, effective and current. An administrative update does not involve changes to policy intent or changes to the management of the protected area. Administrative updates do not require the provision of external involvement opportunities.

**Amendment:** A type of adjustment to management direction. An amendment involves a change in policy and/or alters the intent of management of a protected area to make the management direction relevant, effective and current. Amendments require the provision of external involvement opportunities. (see also secondary plan).

**Biodiversity:** Biological diversity or biodiversity refers to the variety of life, as expressed through genes, species and ecosystems that is shaped by ecological and evolutionary processes.

**Biotic:** Describes the living components of an ecosystem.

**Class Environmental Assessment:** An environmental assessment approved under Part II of the *Environmental Assessment Act* for a class or group of undertakings. The Class Environmental Assessment for Provincial Parks and Conservation Reserves (OMNR 2005a) is an approved Class EA under the *Environmental Assessment Act*.

**Classification:** Organizes provincial parks into broad categories, each of which has particular objectives and characteristics as well as distinctive planning, management and implementation policies. Classification is a key element in determining the general policy basis for park management, which in turn determines the type and extent of activities (protection, recreation, heritage appreciation, scientific research) that may take place in a provincial park. Classification establishes a management framework for individual provincial parks within the provincial protected areas system.

**Conservation reserve:** A protected area regulated under the *PPCRA*. Conservation reserves protect natural heritage values and prohibit industrial uses while allowing a broad range of ecologically sustainable land uses including traditional outdoor heritage activities.

**Crown land:** Refers to all lands, including land under water as well as acquired and non-granted lands (land that has never been sold or transferred by the Ontario government) managed by MNR.

**Crown land use direction:** Provincial level policy that establishes broad direction on how Crown land and water should be used. This direction is generally developed through Crown land use planning processes. For example, Ontario's *Living Legacy Land Use Strategy* (1999), and any other Crown land use direction formally approved by a ministry of the Ontario Government (e.g., *Crown Land Use Policy Atlas*).

**Crown Land Use Policy Atlas:** CLUPA is the official source of area-specific land use policies for Crown lands, and associated mapping of the land use areas, in a large part of central and northern Ontario. CLUPA contains land use policies consolidated from a variety of planning documents such as District Land Use Guidelines (1983 as revised); local land use area plans; Ontario's Living Legacy Land Use Strategy (1999) and the Guide to Crown Land Use Planning (2011).

**Cultural heritage:** This may include archaeological resources, built heritage resources or cultural heritage landscapes. While some cultural heritage resources have been identified and inventoried by official sources, others have never been identified.

**Cumulative effect:** Long-term changes that may occur not only as a result of a single action but the combined effects of successive actions on the environment. These incremental effects may be significant even though the effects of each action, when independently assessed, are not considered significant.

**Designation:** See MNR's Guide for Crown Land Use Planning.

**Earth science:** The physical elements of the natural landscape created by geologic processes and distinguished by their composition, structure and internal layering or stratigraphy and by their relief, contour and spatial distribution or topography.

**Ecological integrity:** Refers to a condition in which biotic and abiotic components of ecosystems and the composition and abundance of native species and biological communities are characteristic of their natural regions and rates of change and ecosystem processes are unimpeded. Ecological integrity includes, but is not limited to the following:

- Healthy and viable populations of native species, including species at risk, and maintenance of the habitat on which the species depend.
- Levels of air and water quality consistent with protection of biodiversity and recreational enjoyment.

**Ecosystem:** A unit of organisms interacting at multiple scales and the abiotic resources on which they depend as a functional and integrated whole.

**Environmental Registry:** The Environmental Registry, established under the *Environmental Bill of Rights*, 1993, is an internet site that provides persons or entities with electronic access to, among other things, certain proposals and decisions and other information related to ministry decision-making.

**Examination:** A thorough assessment of management direction to determine whether the management direction document is still relevant, effective and current, or if changes are required to enable the document to guide the management of the protected area for another 20 years.

**Function:** In regards to natural features, means the natural processes, products or services that species and non-living environments provide or perform within or between ecosystems and landscapes.

**Interim management statement:** Former term for a provincial park management statement approved prior to September 2007.

**Land Information Ontario editor:** LIO is a provincial initiative that supports the province-wide sharing of geographic data. As part of MNR, LIO provides centralized access to data through a number of tools and services (i.e., LIO warehouse, data exchange, data directory and internet mapping).

**Life science:** Living natural resources, including plants, animals, and micro-organisms, plus the environmental resources to which species contribute.

**Management:** Keeping or modifying the natural form, processes and attributes of land and water to some desired condition or state as defined by humans. Management can include maintenance, preservation, protection, enhancement, restoration or any combination thereof.

**Management direction:** May include a management statement or a management plan for a provincial park(s) and/or a conservation reserve(s). Includes statements of conservation interest (for conservation reserves) and interim management statements (for provincial parks). Management direction provides policy for the management of protected areas.

**Management plan:** A document that provides a policy and resource management framework (management direction) for moderately and very complex planning projects and applies one or more provincial parks or conservation reserves or for a combination of them.

**Management statement:** A document that provides a policy and resource management framework (management direction) for non-complex planning projects for one or more provincial parks or conservation reserves or for a combination of them.

**Mandatory contact:** Those audiences who must be contacted during any required involvement opportunity (ies) in protected area management planning. A list of mandatory contacts is maintained by MNR. External audiences can request to be added as a mandatory contact.

**Natural Heritage Information Centre:** As part of MNR, NHIC's mission is to acquire, maintain, update, and make available data on the province's rare species, vegetation communities, and natural areas. NHIC maintains a permanent and dynamic atlas and data bank on the character, distribution and conservation status of natural areas, critical flora and fauna, communities and special features in Ontario.

**Naturalness:** Being natural or near natural in character and relatively undisturbed, or else in the process of recovery from human disturbance.

**Natural heritage:** Natural heritage is all living organisms, natural areas and ecological communities that we inherit and leave to future generations.

**Non-government organization:** A NGO is a legally constituted organization created by private persons or organizations with no participation or representation of any government.

**Planning process:** Refers to the various processes under protected area management planning that make up the management planning cycle. This includes the management planning, examination and adjustment processes (administrative update and amendment).

**Planning project:** Refers collectively to the planning process being undertaken and the specific protected area(s) that are part of that planning process.

**Pressure:** Any natural disturbance or anthropogenic (human) activity or facility (including associated activities) that has an impact on a value, including any ecological process associated with a protected area.

**Project evaluation:** In the context of the Class EA-PPCR, project evaluations pertain to the technical evaluation required as part of each project evaluation and consultation process for Category B and Category C projects.

**Protected area:** Refers to a provincial park or conservation reserve, either existing in regulation or recommended through an approved Crown land use direction.

**Provincial contact database:** A database, maintained by the Parks and Protected Areas Policy Section, that houses contact information for mandatory and discretionary provincial audiences and is used to inform and create contact lists for specific planning projects.

**Provincial park:** Protected area regulated under the PPCRA. Provincial parks protect natural heritage values and prohibit industrial uses while promoting ecologically sustainable recreation and heritage appreciation.

**Recommended protected area:** An area included as a recommended provincial park or conservation reserve in an approved land use direction, but not yet in regulation. Recommended protected areas are under interim protection from industrial activities and land dispositions.

**Regulated protected area:** Refers to an area set apart or established by regulation under the PPCRA as a provincial park or conservation reserve.

**Replacement:** Following an examination, it may be apparent that existing management direction may not be relevant, effective and current and significant changes and/or external interest are required or warranted to proceed with management of a protected area. A replacement involves the preparation of a new management direction.

**Resource management plan:** Former term for a conservation reserve management plan approved prior to September 2007.

**Secondary plan:** A plan prepared, generally for complex topics (e.g., management of fire, vegetation, wildlife, ecosystems), where approved management direction does not provide sufficient policy direction to address those complex topic(s). Secondary plans are considered amendments to management direction.

**Site objectives:** Protected area objectives are concise, measurable statements of the desired future condition for a protected area, resource (value) or resource use which is attainable through management action. Site-specific objectives are consistent with the objectives of the PPCRA.

**Social and economic benefits:** The social and economic benefits that the system of protected areas provide to society. Social benefits of protected areas include use (e.g., a beach that supports recreation) and non-use (e.g., appreciation that protected areas help maintain healthy ecosystems) benefits. Economic benefits include the monetary value and capital assets that protected areas possess and the economic impact of visitor expenditure that support local business and provides employment.

**Species at risk:** Species listed as Special Concern, Threatened, Endangered, Extirpated or Extinct on the Species at Risk in Ontario (SARO) list under Ontario Regulation 230/08 of the *Endangered Species Act*, 2007 as amended from time to time.

**Stakeholder:** Any persons whose right to use, acquire or enjoy property is or may be affected by any action taken under an approved protected area management direction, or whose right to use or enjoy a protected area under a management direction may be infringed upon by an action or a failure to act under the management direction.

**Statement of conservation interest:** A type of management direction for conservation reserves approved prior to September 2007.

**Sustainability:** A characteristic of a process or state that can be maintained indefinitely.

**Treaty rights:** The specific rights of the Aboriginal peoples embodied in the treaties they entered into with a Crown government, initially Britain and after confederation, Canada. They may address matters such as the creation of reserves and the rights of Aboriginal communities to hunt and fish. Existing treaty rights are recognized and affirmed by Section 35 (1) of the *Constitution Act, 1982*.

**Value:** A specific attribute or feature (Aboriginal, cultural, ecological or recreational), or ecological function within a protected area that may require additional/special consideration during the management planning process and subsequent management.

**Value of conservation interest (VCI):** Those values considered to be most significant to a protected area and are often associated with why the protected area was established and/or how the protected area contributes to the protected areas system and the maintenance of ecological integrity.

## 8.0 LIST OF REFERENCES

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## APPENDIX I: SUPPLEMENTARY GUIDELINES, TEMPLATES AND TOOLS

To support the Planning Manual, a series of guidelines along with in-house templates and tools have been developed to assist MNR staff through the technical and procedural aspects of protected area management planning. The guidelines are listed below. Individual guidelines, templates and tools may be adjusted over time, subject to any applicable consultation requirements.

### Guidelines:

- Guideline to Involvement during Protected Area Management Planning (Involvement Guideline)
- Guideline to Management Planning for Protected Areas in the Context of Ecological Integrity (Planning Guideline)
- Examining Protected Area Management Direction Guideline (Examination Guideline)
- Adjusting Protected Area Management Direction Guideline (Adjustment Guideline)

## APPENDIX II: PROTECTED AREAS MANAGEMENT PLANNING HISTORY

The following milestones have led to the approach to planning and management of the protected areas system described in the Planning Manual:

- 1885 – Niagara Falls Park established as Ontario's first publicly owned park (under the Niagara Parks Commission).
- 1893 – Algonquin Provincial Park established.
- 1894 – Rondeau Provincial Park established.
- 1913 – The first Parks Act introduced.
- 1954 – *Provincial Parks Act* enacted to guide development and management of parks.
- 1959 – First park policy statement affirmed protection and recreation as key objectives of provincial parks and renewed emphasis on environmental protection.
- 1959 – *Wilderness Areas Act* enacted and regulation of several small wilderness areas.
- 1960s and early 1970s – Policy changes supported management of provincial parks primarily for the purpose of protection.
- 1967 – Park classification system developed dividing provincial parks into specific classes with compatible sets of uses.
- 1978 – Ontario Provincial Parks: Planning and Management Policies (OMNR 1978) established six park classes, four objectives, associated internal zoning and targets for completing a system of provincial parks. This policy was implemented as part of MNR's District Land Use Planning program.
- 1983 – Provincial Park Management Planning Guidelines defined what park management plans were and why they were to be prepared.
- 1988 – Ontario Provincial Park Management Planning Reference combined and expanded on earlier directions on the role of park management plans and established a process for developing these plans.
- 1992 – Updated Ontario Provincial Parks: Planning and Management Policies (OMNR 1992).
- 1994 – The 1988 Planning Reference was combined with the 1983 guidelines to create the Ontario Provincial Park Management Planning Manual and related directives.
- 1994 – Regulation of the first conservation reserves under the *Public Lands Act*.
- 1997 – The Conservation Reserves Policy provided direction for establishing, planning and managing conservation reserves.
- 1999 – Ontario's Living Legacy Land Use Strategy made significant changes to protected areas policy within the OLL planning area.
- 2005 – A Class Environmental Assessment for Provincial Parks and Conservation Reserves (OMNR 2005a) (Class EA-PPCR) approval in effect.
- 2007 – *Provincial Parks Act* repealed. Proclamation of the *Provincial Parks and Conservation Reserves Act*, 2006 (PPCRA).
- 2009 – Release of the Ontario Protected Areas Planning Manual.
- 2012 – Amendments to the PPCRA as a result of the *Strong Action for Ontario Act (Budget Measures)*, 2012 (Bill 55).
- 2014 – Release of the following supporting guidelines:
  - ▲ Management Planning for Protected Areas in the Context of Ecological Integrity
  - ▲ Examining Protected Areas Management Direction
  - ▲ Adjusting Protected Areas Management Direction
  - ▲ Involvement during Protected Area Management Planning
- 2014 – New edition of the Ontario Protected Areas Planning Manual.